

Iowa LIHEAP Program Notice (PN) 27-01

To: Executive Directors and LIHEAP Coordinators
From: Bill Marquess, LIHEAP Program Manager
Date: September 2, 2026
Re: Changes to Iowa LIHEAP Policy and Procedures Manual

Effective Date: October 1, 2026

Iowa LIHEAP FY27 Policy and Procedures Manual

Listed below are notable changes to the *Iowa LIHEAP Policy and Procedures Manual* for the FY27 program year.

Website Address for State LIHEAP Data Management System: <https://liheap-apply.hhs.iowa.gov/s/>

**active Nov 01, 2026 for general public*

2.30 Appeal and Hearing Procedure

- Revised entire section to reflect the updated state Appeal and Hearing Procedure.

4.11 LIHEAP Regular Assistance Season (Heating Season) Oct 01 – Apr 30

- Bullet 4: Revised: If a LIHEAP customer is denied assistance, they may submit a new application if their circumstances change, as updated information could make them eligible for benefits. A signed and dated application serves as the applicant's attestation that their circumstances have changed. Customers may submit new applications multiple times throughout the year.
- Bullet 7: Revised for clarity: An application must be approved or denied by the CAA within a maximum of 30 calendar days following the date the LIHEAP application is received by the local CAA.
- Bullet 8: Added for clarity: The approved LIHEAP customer and both utilities must be notified in writing or electronically of the approval within 30 days the date the LIHEAP application is received by the local CAA.
- Bullet 10: Revised for clarity of received date field as requirement
- Bullet 11: Revised for clarity of received date field as requirement
- Bullet 12: Revised section to reflect the updated state requirements to document attempt to contact customer to request missing information and/or documentation.
- Bullet 15: Revised extenuating circumstances statement.
- Bullet 16: Revised to include denial after attempt to contact customer.
- Bullet 17: Revised section to reflect incomplete applications received on the last day of the heating season – These applications must be held in a pending status and the customer must receive a written request for documentation.

4.20 Application Methods

- Clarified shared custody, documentation and LEWIS entry
- Clarified - CAAs must use a **state approved** Application/Intake Form when LIHEAP customers apply for ECIP (crisis benefits) that will be combined with other agency crisis funds to fully resolve an energy-related crisis

4.30 Who May Sign an Application

- Added: Any documentation provided by the customer authorizing another individual to sign the application on their behalf must be uploaded to LEWIS

4.40 Automatically Eligible (AE) Households

- Clarifies fixed income as **countable** income sources
- Clarifies income received by a household member under 18: Although the income does not count toward household income, it can still qualify the household for automatic eligibility when it is the only source of income. In these cases, the minor's income provides the fixed income point and CAAs must document proof of that income for the household.
- Added clarification that LEWIS determines the appropriate assistance level and marks the household as Auto Eligible (AE)
- Added/revised section to reflect new AE application that requires customer to provide current utility bills and landlord statement/rental agreement (if applicable).
- Removes the four previous questions.
- Clarifies income sources should not be deactivated in LEWIS from the previous year if income is not updated.
- Clarifies agencies may provide a state provided intake form to complete a new application with the household but may not use a modified intake form to reverify AE households.
- Added: Reverification Period section
- Clarifies the LEWIS system determines reverification periods. CAAs may not determine an agency- determined reverification cycle.
- Added clarification to AE eligibility.

4.60 Online Applications / System Intake

- Revised retention of records for 10 years in accordance Section 1.8.2 Subrecipient Monitoring - Record Retention and Access Section 1: Special Terms.

4.90 Determination Letter

- Clarified reapplication

5.30 Who Can Apply

- Clarified: College students must live at home full-time **at the time of application** to be counted as a household member.

6.10 Eligibility Period to Qualify for Assistance

- Added: most recent filed federal income tax return as an acceptable time period for income.
- Revised: When using a federal tax return to verify income, all pages completed by the customer or preparer that align with the current LIHEAP Tax Return Usage Guide, including all pages with a signature required, must be provided and scanned into LEWIS. At minimum, pages one and two of the federal 1040 is required.

6.40 Collection of Income

- Clarifies that income will be entered as shown on the proof of income – rounding of income to the nearest dollar is not allowed.

6.50 Atypical Scenarios

- Clarified Self Employment: Collect the most recent filed Federal tax return for self-employed households in business for 12 or more months.
 - If the self-employed household has not filed a Federal tax return and has been in business for 12 or more months, collect gross receipts for the most recent calendar year.
 - If the household has been self-employed for less than 12 months, collect gross income for the most recent 30 calendar days.

7.00 U.S. Citizen/Social Security Number (SSN) Documentation Requirements

- Updated: If the SSN card is not presented at the time of application, the household must present proof of the SSN or obtain a waiver in order for that household member to be deemed eligible. If a household member is not able to provide documentation verifying their SSN, waivers may be requested on a case-by-case basis.

7.10 Acceptable Documentation

- Added: NOTE: If this member is not currently in LEWIS, documented verification of SSN is required.

7.40 Entering SSN/Documentation into LEWIS

- Revised: Eliminated “if known” - Social Security Number (SSN) Presented (from an approved document) = Enter 9-digit SSN
- Revised: Eliminated “if known” - Driver’s License Presented/Photo ID = Enter 9-digit SSN may be provided verbally or in writing by the LIHEAP customer)

8.00 Customer Documentation and Recordkeeping Requirements

- Revised length of program data retention to ten (10) years.

8.10 LIHEAP Regular Assistance Customer Documentation

- Revised: Completed signed application/intake form by customer (signed and completed by customer if applicable)

- Added: Staff and/or the customer cannot elect to remove members due to refusal to provide required information. If refusal to provide required information, the customer's application will be determined ineligible.
- Clarified – Utility bills include heating and electric

8.20 ECIP/Crisis Assistance Documentation

- Revised: Completed signed application/intake form by customer (signed and completed by customer if applicable)
- Revised: Description of the crisis event and the steps taken to resolve it entered in LEWIS under BA section. Dates of contact with utility must be recorded in notes, along with pledge.

9.10 Utility Vendor Files

- Clarified: Receipt of funds documentation uploaded in LEWIS under Batch Payment associated with payment

9.20 HVAC Contractor Files

- Added: Must be uploaded to LEWIS under the Contractor/Provider record (all documents in one PDF file)

10.00 Moratorium Period on Winter Disconnections

- Bullet 5: Revised for clarity: An application must be approved or denied by the CAA within a maximum of 30 calendar days following the date the LIHEAP application is received by the local CAA.

11.10 Primary Energy Supplier/Vendor/Utility

- Revised: If the primary energy supplier account is in the landlord's name and the LIHEAP customer can provide proof of the landlord's account number, the benefit payment may be made directly to the energy supplier instead of making a direct payment to the LIHEAP customer, provided the energy supplier and landlord agree (documentation of such agreement **must be obtained each year** and be maintained in the file).

12.23 Supported Expenses

- Revised regulator replacement allowance for LIHEAP eligible customer.
- Added/clarified:
 - Utility past/back bill incurred prior to the start of the LIHEAP application period (ECIP crisis funds only)
 - Gas lines (ECIP crisis funds only)
 - Utility deposit fees for new service (ECIP crisis funds only)
 - Tank rental/leasing (ECIP crisis funds only)
 - Cost to set a new tank (ECIP crisis funds only)

12.24 Unsupported Expenses

- Added/clarified:
 - Utility past/back bill incurred prior to the start of the LIHEAP application period (LIHEAP Regular Assistance only)
 - Amounts owed on business/commercial accounts

12.30 Debarment and Suspension

- Added: Search results must be maintained within LEWIS

13.20 Disconnected from Heat Source - Crisis

- Added: The agency must document on the Benefit Assignment in LEWIS date guarantees are made to vendor, along with details that supports total need and assistance by the agency.
- Clarified: If the customer has already met the maximum ECIP in the program year and a waiver is not approved, the application should be set to denied **and a denial letter provided to the customer.**

14.00 Change of LIHEAP Customer Status

- Added: If no changes have been made to the household, the agency staff must not make any changes to income.

14.20 After LIHEAP Payment is sent to the Vendor

- Revised: The CAA is required to maintain and include notations in LIEWS regarding when the check was received by the CAA.
- Added: Attempts to locate the customer to reissue the returned funds must be documented in LEWIS.

15.00 ECIP Crisis Assistance

- Added: If a LIHEAP customer requesting ECIP crisis assistance has not applied and approved for Regular Assistance benefit, income verification is needed to approve ECIP. The customer is required to sign the ECIP application attestation.
- Clarified - Energy Crisis ECIP Situations - NOTE: 48 hours is 48 continuous hours, not 48 business hours (six working days)
- Clarified: Life-threatening ECIP Situations - NOTE: 18 hours is 18 continuous hours, not 18 business hours (2.2 working days)

15.10 ECIP (Energy Crisis Intervention Program) Crisis Assistance

- Added: ECIP Services Available to Address an Energy Crisis – Regulator Replacement

15.20 ECIP Operational Rules per Funding Levels

- Clarified: Service Continuity is an allowable cost April 1 – April 30.

15.31 Heating Unit Repair/Replacement – with Weatherization

- Revised: Eliminated the requirement for the LP tank to be owned by the customer for regulator replacement.

15.32 Heating Unity Repair/Replacement – NOT with Weatherization

- Added: Agencies must obtain a written estimate or quote from the furnace contractor that outlines the initial diagnosis of the furnace issue and, if applicable, the cost of replacement.
- Added: Waiver request must provide detailed description of initial diagnosis of the furnace issues that warrants the furnace replacement.
- Removed: If the LP tank is vendor owned, the vendor is responsible for the regulator replacement.
- Revised: Radiators may be repaired/replaced (contact the state LIHEAP office for prior approval)
- Added: Regulator and valve replacement for LIHEAP eligible customer

15.50 Low Tank & Empty Tank – Emergency Fuel Delivery

- Clarified: Arrearages expense - Arrearages to ensure emergency delivery (if only paying arrearages, enter under Service Continuity)
- Added: Regulator and valve replacement for LIHEAP eligible customer (ECIP crisis funds only)
- Removed: Regulator and valve replacement for tanks owned by the LIHEAP customer
- Added unsupported expenses: Amounts owed on business/commercial accounts

15.60 Reconnection

- Added unsupported expenses: Amounts owed on business/commercial accounts

15.70 Service Continuity

- Added to unsupported expenses: Amounts owed on business/commercial accounts

16.10 Assurance 16 Components

- Revised: Case Management – Short/Long Term - Working with clients on a customized energy education and/or budget management plan over an extended time period

19.00 State Monitoring

- New section to PPM

21.00 Definitions

- Revised: Fixed Income Household: A household that receives only one or more of the following **countable** income types
- Revised: Household/Customer: The Head of Household is identified as SELF when the initial household was created in LEWIS. This designation should only be changed if that individual is no longer part of the household.

Appendix A – Sample Press Release

- Updated dates and Annual Gross Income for FY27.

Appendix B – Poverty Guidelines

- Updated Annual Gross Income for FY27.

Appendix C – Income Source Guide

- Updated countable income sources / types for FY27
 - IRA - If actively drawing funds from the account, do not mark the household with Savings < \$50,000 if the IRA is worth more than \$50,000.
 - MEPS income – Not countable income.
 - Military Pay (active duty)
 - BAS – Basic Allowance for Subsistence – Not countable income
 - HDP – Hardship Duty Pay – Not countable income
 - Pensions If actively drawing funds from the account, do not mark the household with Savings > \$50,000

Appendix D – Energy Burden Table

- Added - NOTE: Customer may be eligible for Weatherization if all other program criteria are met.

Appendix E – Energy Burden Table

- Updated image of new Monthly Expenditure Report Template
- Added – The Deliverable Fuel line item will be used for deliverable vendors who do not have a signed prebuy agreement, as well as to direct pay deliverable customers who qualify for direct payment. This line item will be used throughout the entire year for these payments

Appendix I – Benefit Maximums

- Clarified Targeting Factors – Fixed Income Only – no other **countable** sources of income

Appendix J – LIHEAP Appeal and Hearing Procedure

- Revised: Updated language on appeals and hearing procedures will be provided in a program notice.

Appendix K – Waste, Fraud, and Abuse (WFA) Policy

- Added: New section to PPM